

# Agency Customer Feedback Systems Review

## Part 1: Customer Feedback Instrument Assessment

*Please complete one assessment for each ongoing customer feedback instrument or study used by your organization.*

### A. General Information

1. Type of the Instrument/Study (Select the <b>primary</b> method that was used for this survey): <input type="checkbox"/> Written Survey: <input type="checkbox"/> e-mail, <input type="checkbox"/> mail, <input type="checkbox"/> in-person, or <input type="checkbox"/> phone survey <input type="checkbox"/> In-person Interview <input type="checkbox"/> Focus Group <input type="checkbox"/> Other:
2. Customer Type (Select all applicable): <input type="checkbox"/> Clients (Example: people who receive services from your programs) <input type="checkbox"/> Providers (Example: providers who deliver services to your clients) <input type="checkbox"/> Partners/stakeholders (Example: people who are involved in policy making process) <input type="checkbox"/> Other:
3. Name of the Customer Group (e.g., foster parents, TANF recipients, Medicaid clients, etc.):

### B. Instrument/Study Schedule

1. How often do you conduct this study (e.g., ongoing, annually, quarterly, etc.)?
2. When was the start date of the most recent study? (mm/yyyy)
3. How many times have you conducted this study?
4. When do you plan to conduct it again? (mm/yyyy)
5. If this study is ongoing, how often do you review the data?
6. How could you improve the scheduling of the study?

### C. Participant Selection

1. How did you select participants/respondents for this study? <input type="checkbox"/> Everyone <input type="checkbox"/> Scientifically drawn random sample – please explain.  <input type="checkbox"/> Other type of sample – How did you select the sample?
2. How many people were given the opportunity to respond (approximation OK)?
3. How many people actually responded? Number: _____; Percentage: _____
4. Did you have demographics from your respondents (e.g., program/service used, language, age, geographic location, etc.)? <input type="checkbox"/> Yes <input type="checkbox"/> No – Please explain:
5. Did you compare the response demographics with the universe of possible respondents? <input type="checkbox"/> Yes <input type="checkbox"/> No – Please explain:

6. How could you improve the sampling methodology?

**D. Instrument Development**

1. Is this a pre-validated, standardized instrument?  
 Yes – Please name the instrument (then skip to question D4):  
 No

2. Did you have someone review the instrument for formatting and phrasing?  
 Yes – Who (e.g., co-workers, research staff, managers, etc.):  
 No

3. What is the literacy level of the instrument? Grade:

4. Did you pretest this instrument?  
 Yes – If yes, who helped pretest this instrument?  
 Experts (program experts or research experts)  
 Clients  
 Providers  
 Partners/Stakeholders  
 Other – Please specify:  
 No

5. How did you determine that the questions in your instrument addressed issues important to the respondents and to agency program/policy makers?

6. Does this instrument help you learn more about issues identified in previous studies?  
 Yes  
 No  
 N/A – No previous studies

7. Did you refine the instrument based on responses from previous use of this or similar instrument(s)?  
 Yes  
 No

8. How could you improve the instrument?

**E. Communication of Results**

1. How did you report the results of this study (what product was produced, e.g., a narrative report, summary, table, database, etc.)?

2. How did you make the results of the study available (e.g., e-mail, Website, hardcopy reports, etc.)?

3. With whom did you share the results (please specify for each checked item)?  
 Staff:  
 Executive Managers:  
 Clients:  
 Providers:  
 Partner/Stakeholders:  
 Study Participants:  
 Other:

4. How can customers and staff access the results (e.g., phone request, public disclosure request, email, Website, library, newsletter, etc.)?

5. How could you improve communication of the study results?

**F. Use of the Results - Filling out this section may require collaboration with program/policy makers.**

1. What program changes were made due to information learned from study results?

- Improvement on efficiency or effectiveness
- Communication and Marketing
- Funding request
- Resource allocation
- Training
- Customer Service
- Other:

Please provide a brief description of identified changes.

2. Did the information help assist in making decisions to improve customer service?

- Yes
- No

3. Have you compared these results with other studies to identify patterns or inconsistencies?

- Yes
- No

4. Were these improvements shared with other programs that serve similar clients or provide similar services?

- Yes – Please specify:
- No

5. Were the results used as part of the strategic planning process?

- Yes
- No

6. Were the results used to identify issues for further study?

- Yes – Please specify:
- No

7. How could you improve the utilization of study results?

## Part 2: Customer Feedback Systems Overview

*This overview should collectively reflect all the customer feedback instruments used by your organization*

This Overview should be conducted under the direction of the executive managers with input from research staff and key policy-makers. Looking at all customer feedback studies conducted by your program, please rate your program in the following categories (choose the highest rating that fits in each category).

### 1. Participant Selection

#### A. Groups Included

- High Rating* – All customer groups have the opportunity to provide feedback
- Medium Rating* – All major customer groups have the opportunity to provide feedback
- Low Rating* – At least one major customer group does not have the opportunity to provide feedback

#### B. Representativeness

- High Rating* – At least one study per customer group reaches all customers or a random sample
- Medium Rating* – More than 70% of customers are asked to participate in studies OR are part of the sampling frame for a random sample
- Low Rating* – Less than 70% of customers are asked to participate in studies or are part of the sampling frame for a random sample

#### C. Response Rate

- High Rating* – At least one survey aimed at the primary customer group(s) has a response rate of 45% or higher.
- Medium Rating* – At least one survey aimed at the primary customer group(s) has a response rate of 30% or higher.
- Low Rating* – None of the surveys aimed at the primary customer group(s) reaches a response rate of 30% or higher.

How could you improve participation in your customer feedback process?

### 2. Instrument Development

#### A. Review

- High Rating* – At least three-quarters of the instruments used are reviewed for format, content and question phrasing by qualified persons
- Medium Rating* – At least half of the instruments used are reviewed for format, content and question phrasing by qualified persons
- Low Rating* – Less than half of the instruments used are reviewed for format, content and question phrasing by qualified persons

#### B. Pre-Testing

- High Rating* – At least three-quarters of the instruments used are pretested
- Medium Rating* – At least half of the instruments used are pretested
- Low Rating* – Less than half of the instruments used are pretested

#### C. Literacy Level

- High Rating* – Literacy level in at least three-quarters of instruments is lower than 8th grade
- Medium Rating* – Literacy level in at least half of instruments is lower than 8th grade
- Low Rating* – Literacy level in more than half of instruments is higher than 8th grade

How could you improve instrument development?

### 3. Communication of Results

- High Rating* – Results of most customer feedback studies are readily available to all stakeholders, clients and staff in an easily accessible way
- Medium Rating* – Results of most customer feedback studies are made available to program leadership and some designated staff
- Low Rating* – Results of most customer feedback studies are available only if requested

How could you improve the communication of customer feedback study results?

### 4. Use of the Results

#### A. Strategic Planning and Performance Measures

- High Rating* – Customer feedback is reviewed and discussed by the management team and program managers, and is used to develop strategic plan and performance measures.
- Medium Rating* – Customer feedback is reviewed and discussed by the management team and program managers, but is not used to develop strategic plan and performance measures.
- Low Rating* – Customer feedback is not reviewed by the management team or program managers.

How could you make customer feedback more useful in your strategic planning process?

#### B. Business Process Changes

- High Rating* – Customer feedback is used to measurably improve program-wide business processes
- Medium Rating* – Customer feedback is used to improve business processes within program units
- Low Rating* – Customer feedback is seldom used to improve business processes

How could you improve the utilization of customer feedback results?

### 5. Are there other things you would like to do to get the customer feedback you need?

## Part 3: Questions and Answers

- 1. Who should fill out the customer feedback instrument assessment?** The person who was responsible for developing and administering the customer feedback instrument should fill out this assessment. One assessment should be filled out for EACH instrument currently used by the organization.
- 2. What does “Customer Feedback Instrument” mean?** A “Customer Feedback Instrument” could be a written survey; phone survey; survey with in-person interviews; or focus group sessions, stakeholder meetings or community meetings including structured feedback. Generally the customer feedback instrument is used to gather data for a customer feedback study. The “customers” who provided feedback could be citizens, clients, businesses, providers, partners, stakeholders, or constituents of the program.
- 3. How to answer the question about “literacy level”?** The response to Question D-3 should be the reading grade level for the instrument. You can determine the reading level using the Spelling and Grammar tool in WORD. Be sure to highlight the entire instrument and check the “show readability statistics” option.
- 4. If we are developing an instrument right now, will I need to fill this out?** If you want to get credit for the stage of development you are in with your instrument, you may fill out the assessment. You will need to acknowledge that this instrument is in process and only complete those sections that apply.
- 5. What instruments need an assessment done on them?** Instruments used any time during the last 3 years should be included in the assessment.
- 6. Who should be doing the customer feedback systems overview?** The overview is an overall evaluation of the assessments results of your organization. The executive managers of your organization should conduct this overview with input from his/her research staff and key policy makers.

## Part 4: Glossary

<b>Demographics</b>	<p><b>Demographics of the universe of possible respondents:</b> The known characteristics of the customer group you are studying, i.e., the percent that uses different programs and services, age, gender, language, geographic location, etc.</p> <p><b>Response Demographics:</b> The characteristics of your survey respondents, i.e., program/service used, language, age, gender, geographic location, etc.</p> <p>NOTE: A good surveyor should look to see if the characteristics of his or her respondents differ significantly from the characteristics of the larger group studied. Such differences can indicate that the study results are not representative of the larger group.</p>
<b>Improvement Opportunities</b>	Areas that were identified in the survey results that can be changed in a program to better the program.
<b>Literacy Level</b>	The reading grade level for the instrument. You can determine the reading level using the “Spelling and Grammar” tool in WORD. Be sure to highlight the entire instrument and check the “show readability statistics” option. (Hint for users: The Word literacy level is a fairly crude tool. You may want to supplement with the “Fog Test.” See <a href="http://www.ziskadesigns.co.uk/plainenglish-s9.html">http://www.ziskadesigns.co.uk/plainenglish-s9.html</a> )
<b>Pre-Validated Standardized Instrument</b>	An instrument (generally a set of survey questions) that is in wide-spread use beyond Washington State. Such instruments have generally been extensively tested with different populations, and have established norms for different populations.
<b>Scientifically Drawn Random Sample</b>	A sample that is drawn using a deliberate random process (random number table or electronic equivalent). This may include stratified random samples or purposive oversampling of small groups. If logistical considerations required modifications to the sampling scheme, explain in question C1.